Freemium to Premium: Monetizing with PayPal



Matt Cole

WordPress is used on 14.9% of the top 1 million websites, making it the most popular content management system in use on the internet today. See how to turn your WordPress content into dollars using PayPal.

PAYPAL DIGITAL GOODS SUBSCRIPTIONS

SETUP AND CONFIGURATION

This lab requires that you have the following software installed:

- XAMPP (version 1.7 or better), or an equivalent combination of Apache, PHP, and MySQL
- WordPress (version 3.2 or better)
- Your favorite text editor, such as Notepad++, Komodo Edit, Emacs, or vi

Throughout this document, the following styles are used to simplify instructions:

- Folder names, file names, menu items, and field prompts are formatted in bold.
- Code snippets/samples, function names, and names of API calls are always in monotype.
- Literal text that you need to enter is always in monotype and bold.
- Literal text that you need to remove is always in monotype and strikethrough.
- The ellipsis (...) indicates additional text or code that is not shown.
- Screenshots are formatted with a glowing border.
- Special notes, such as this one, are enclosed in boxes.

You should have a copy of the paypal-dg-subscriptions.zip file on your desktop. This file does not need to be expanded.

WINDOWS XAMPP USERS

You will need to enable cURL support in PHP before beginning. To do this:

- 1. Locate the folder where you installed XAMPP (this will usually be C:\xampp).
- 2. Open the php folder.
- 3. Open **php.ini** with your text editor.
- 4. Locate the following line and remove the semicolon from the beginning of the line to uncomment it: ;extension=php curl.dll
- 5. Save the file.
- 6. Restart Apache through the XAMPP Control Panel.

ABOUT THIS LAB

This lab demonstrates how to create a plugin for WordPress that allows you to restrict certain content so that it is visible only to paying members. WordPress is a popular, open source blogging and content management system, built on the open source PHP and MySQL platforms. It is used by 14.9% of the top 1 million websites¹, making it the most popular content management software in use on the internet today.

Before you start this lab, you will be expected to have Wordpress installed. No more than a basic installation is needed. If you do not have WordPress installed, an additional handout will be provided to you with instructions on how to install it - refer to that handout before starting this lab.

You will be provided with the shell of the plugin; the shell allows you to restrict content, but it does not provide any sort of payment processing. During the course of the lab, you will build up the plugin to add in this missing functionality, using PayPal's Digital Goods checkout experience to collect payments from your buyers. While this plugin will not cover every conceivable scenario, it is intended to give you a foundation upon which you can build additional functionality later.

ABOUT MATT COLE

Matt Cole has been tinkering with computers for as long as he can remember. In fourth grade, he found a book of BASIC games laying around the basement. It intrigued him, so one day he took it to school and started entering them into the school's Apple II's computers. He hasn't stopped programming since – adding Pascal, C++, Visual Basic, Visual C#, PHP, and SQL to his repertoire. Matt joined PayPal in 2009 as an Integration Engineer, working with merchants of all sizes to integrate PayPal's products into their solutions.

¹ According to w3techs.com, as of September 25, 2011. Source:

LAB 1 - INSTALL THE PLUGIN AND ADD PAYPAL-SPECIFIC FIELDS TO THE PLUGIN'S CONFIGURATION

CREATE A NEW CATEGORY TO REPRESENT YOUR PREMIUM CONTENT.

- 1. Open your WordPress admin.
- 2. Under the **Posts** section, click **Categories**.
- 3. In the Name box, enter Premium Content.
- 4. Click Add New Category.

INSTALL THE PREMIUM CONTENT PLUGIN.

WINDOWS/LINUX USERS

- 1. Open your WordPress admin.
- 2. On the left-hand side of the page, click **Plugins**.
- 3. Click Add New.
- 4. Click Upload.
- 5. Click the Browse... button and locate the paypal-dg-subscriptions.zip file.
- 6. Click Install Now.
- 7. Click Activate Plugin.

MAC OS X USERS

- 1. Locate the paypal-dg-subscriptions.zip file and decompress it by double-clicking on it.
- 2. Click on the paypal-dg-subscriptions folder.
- 3. Copy the folder by going to **Edit->Copy** (or pressing **Command-C**).
- 4. Open your Applications folder.
- 5. Open the XAMPP folder.
- 6. Open the htdocs folder.
- 7. Open the wordpress folder.
- 8. Open the **wp-content** folder.
- 9. Open the plugins folder.
- 10. Paste the folder by going to Edit->Paste (or pressing Command-V).
- 11. Open your WordPress admin.
- 12. On the left-hand side of the page, click **Plugins**.
- 13. Locate the PayPal Digital Goods Subscriptions plugin and click the Activate link underneath it.

TEST VOLUM COME

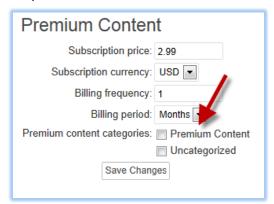
TEST YOUR CODE

1. Verify that a link called **Premium Content** shows up under both the **Users** section and the **Settings** section.

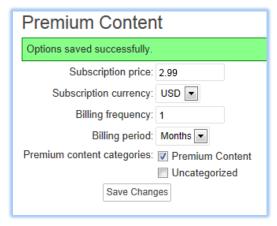


ADD THE PREMIUM CONTENT CATEGORY TO THE LIST OF CATEGORIES REGULATED BY THE PLUGIN.

- 1. Open your WordPress admin.
- 2. Under the **Settings** section, click **Premium Content**.
- 3. Verify that **Premium Content** is listed as one of the checkboxes under the **Premium content categories** section.

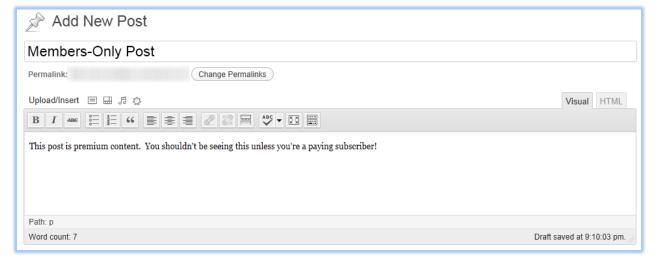


- 4. Click the Premium Content checkbox.
- 5. Click Save Changes. You should see a notice telling you that the changes were saved successfully.



TEST YOUR CODE

- 1. Open your WordPress admin.
- 2. Click Posts.
- 3. Click Add New.
- 4. Enter a title and body for the post.



- 5. Click Screen Options.
- 6. Click the **Excerpt** checkbox.

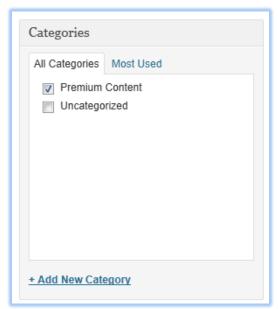


7. Enter an excerpt in the space that appears.



Note: The plugin shows the excerpt to unsubscribed members. If you do not explicitly provide an excerpt, WordPress will use the first 55 words of the article as the excerpt (with all formatting and HTML stripped). Explicitly providing an excerpt can help protect shorter articles, or articles where you do not want the buyer to see any content before they subscribe.

8. Make sure the **Premium Content** category is checked.



- 9. Click the **Publish** button.
- 10. Click View post.
- 11. Verify that you see the excerpt, and not the full post.



12. Click **Click here to subscribe**. The invite to subscribe should disappear, and the content of the post should be replaced by the full text of the article.

Members-Only Post

This post is premium content. You shouldn't be seeing this unless you're a paying subscriber!

This entry was posted on Sunday, September 25th, 2011 at 9:19 pm and is filed under Premium Content. You can follow any responses to this entry through the RSS 2.0 feed. You can leave a response, or trackback from your own site. Edit this entry.

- 13. Click Dashboard.
- 14. Under Users, click Premium Content.
- 15. Click Unsubscribe. You should see a notice informing you that you have been unsubscribed.

Premium Content

You have been successfully unsubscribed from this site's premium content.

DEACTIVATE THE PLUGIN.

- 1. Open your WordPress admin.
- 2. Click Plugins.
- 3. Click the **Deactivate** link underneath the PayPal Digital Goods Subscriptions plugin.

OPEN paypal-dg-subscriptions.php IN YOUR TEXT EDITOR.

- 1. Open your text editor.
- 2. Open the File menu and select Open...
- 3. Navigate to the folder where XAMPP is installed. (For Windows users, this will usually be C:\xampp.)
- 4. Open the htdocs folder.
- 5. Navigate to the subfolder where WordPress is installed.
- 6. Open the wp-content folder.
- 7. Open the plugins folder.
- 8. Open the paypal-dg-subscriptions folder.
- 9. Open the paypal-dg-subscriptions.php file.

ADD OPTIONS TO WORDPRESS TO STORE INFORMATION NEEDED BY PAYPAL.

ENTER CODE 1.1

ENTER CODE 1.2

```
function pdgs_admin() {
...
    pdgs_admin_start_form();
    pdgs_admin_display_textbox( 'API username', 'pdgs_api_username',
        get_option( 'pdgs_api_username' ), 40 );
    pdgs_admin_display_textbox( 'API password', 'pdgs_api_password',
        get_option( 'pdgs_api_password' ), 40 );
    pdgs_admin_display_textbox( 'API signature', 'pdgs_api_signature',
        get_option( 'pdgs_api_signature' ), 60 );
    pdgs_admin_display_textbox( 'Subscription name', 'pdgs_subscription_name',
        get_option( 'pdgs_subscription_name' ), 40 );
    pdgs_admin_display_checkbox( 'Use Sandbox?', 'pdgs_use_sandbox',
        get_option( 'pdgs_use_sandbox' ) );
    pdgs_admin_display_textbox( 'Subscription_price', 'pdgs_price', get_option( 'pdgs_price' ) );
```

ADD A BLOCK OF TEXT WITH A LINK TO INSTRUCTIONS ON HOW TO RETRIEVE YOUR API CREDENTIALS.

ENTER CODE 1.3

TEST YOUR CODE

- 1. Open your WordPress admin.
- 2. Click Plugins.
- 3. Locate the PayPal Digital Goods Subscriptions plugin and click the Activate link underneath it.
- 4. Under the **Settings** section, click **Premium Content**.
- 5. Verify that the API username, API password, API signature, and Subscription name text boxes appear, and that they show the default values. Also, verify that the Use Sandbox? checkbox appears, and that it is checked.

Premium Content	
You'll need to get a set of API credentials from PayPaI to use this plugin. <u>Click here</u> for instructions on retrieving your API credentials.	
API username:	test1
API password:	test2
API signature:	test3
Subscription name:	Members Only Subscription
Use Sandbox?:	♥
Subscription price:	2.99
Subscription currency:	USD •
Billing frequency:	1
Billing period:	Months 🔻
Premium content categories:	
	Uncategorized
	Save Changes

ENTER CODE 1.4

VALIDATE THE DATA THAT WAS ENTERED.

For now, we'll just validate that something was entered. Later, we'll go back and do a more thorough validation that ensures that we can run API calls with those credentials.

ENTER CODE 1.5

TEST YOUR CODE

- 1. Log in to your WordPress admin.
- 2. Under Settings, click Premium Content.
- 3. Delete the API username, API password, API signature, and subscription name.
- 4. Click **Save Changes**. You should receive an error indicating that you must enter each piece of information:

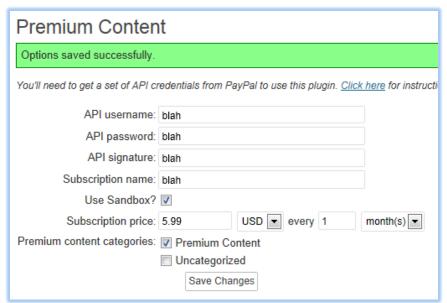
Premium Content The following errors occurred while trying to save your options: You must enter an API username. You must enter an API password. You must enter an API signature. You must enter a subscription name.

UPDATE THE OPTIONS WITH THE SUBMITTED VALUES.

ENTER CODE 1.6

TEST YOUR CODE

- 1. Log in to your WordPress admin.
- 2. Under Settings, click Premium Content.
- 3. Change the values for API username, API password, API signature, and Subscription name.
- 4. Click **Save Changes**. You should receive a notice telling you that the options were saved successfully. The new values you entered should show after saving.



ENTER CODE 1.7

TEST YOUR CODE

- 1. Log in to your WordPress admin.
- 2. Under Settings, click Premium Content.
- 3. Enter junk text in the API username, API password, and API signature fields.
- 4. Click Save Changes. You should see a warning message indicating that your credentials could not be validated.



- 5. Retrieve your API credentials from the PayPal Sandbox and enter them on the page.
- 6. Click **Save Changes**. The warning message should not appear.

REMOVE THE CLICK HERE TO SUBSCRIBE LINK.

ENTER CODE 2.1

```
function pdgs_display_signup_invite( $excerpt ) {
    ...
    Price: $price
    <a href="javascript:void(0)" onClick="getPremiumContent()">Click
here to subscribe</a>
    </div>
    ...
}
```

REMOVE THE getPremiumContent JAVASCRIPT FUNCTION.

ENTER CODE 2.2

```
function pdgs display signup invite( $excerpt ) {
</div>
<script type="text/javascript">
function getPremiumContent() [
   <del>iQuery.ajax( [</del>
      url: "$ajaxurl?action-pdgs finish&pdgs post id-$the id",
      success: function( data, textStatus, jqXHR )
         - jQuery( "#pdgs_content" ).html( data );
          jQuery( "#pdgs_error" ).hide();
          jQuery( "#pdgs form" ).hide();
       error: function ( jqXHR, textStatus, errorThrown )
         -jQuery( "#pdgs error" ).html( "An error occurred while trying to activate your
              Please try again later.");
          jQuery( "#pdgs error" ).show();
</script>
EOF;
```

ADD THE DIGITAL GOODS HTML FORM.

ENTER CODE 2.3



TEST YOUR CODE

- 1. Navigate to the sample post you created in Lab 1.
- 2. You should see the Pay with PayPal button displayed underneath the post.

Members-Only Post

You need to subscribe to see the content of this post.

To see the full content of this post, subscribe to our premium content by clicking below.

Price: 2.99 USD every month



ADD A REFERENCE TO THE PAYPAL DIGITAL GOODS JAVASCRIPT FILE.

ENTER CODE 2.4

```
function pdgs_display_signup_invite( $excerpt ) {
    ...
    </form>
    </div>
    <script type="text/javascript" src="https://www.paypalobjects.com/js/external/dg.js"></script>
    EOF;
    ...
}
```

CONSTRUCT THE DGFlow OBJECT.

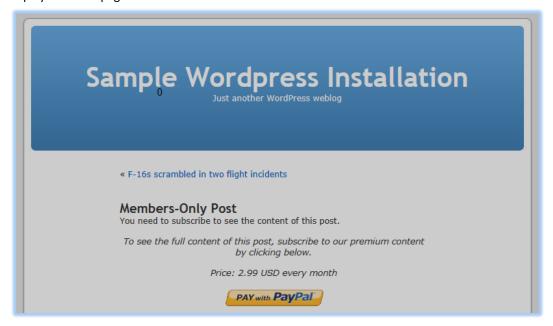
ENTER CODE 2.5

```
function pdgs_display_signup_invite( $excerpt ) {
    ...
    <script type="text/javascript" src="https://www.paypalobjects.com/js/external/dg.js"></script>
    <script type="text/javascript">
    var pdgs_dg = new PAYPAL.apps.DGFlow( { trigger: "pdgs_btn" } );
    </script>
    EOF;
    ...
}
```



TEST YOUR CODE

- 1. Navigate to the sample post you created in Lab 1.
- 2. Click the **Pay with PayPal** button. You should see a lightbox displayed on top of the page. You will also see a **0** displayed on the page.



Note: To exit the lightbox, refresh the page.

ADD A FUNCTION TO DISPLAY ERROR MESSAGES AND CLOSE THE LIGHTBOX.

ENTER CODE 2.6



ADD A FUNCTION TO RUN A SetExpressCheckout CALL.

The pdgs run api call function has been provided to you to facilitate running API calls to PayPal.

ENTER CODE 3.1

```
function pdgs_setec() {
               = $_POST[ 'pdgs_post_id' ];
   $post_id
   $price
                = get_option( 'pdgs_price' );
   $currency = get_option('pdgs_currency');
$subscr_name = get_option('pdgs_subscription_name');
   $returnurl = admin url( 'admin-ajax.php?action=pdgs finish&pdgs post id=' . $post id );
   $cancelurl = admin_url( 'admin-ajax.php?action=pdgs_cancel' );
   $req = array(
      'VERSION'
                                           => '82.0',
      'METHOD'
                                           => 'SetExpressCheckout',
      'RETURNURL'
                                           => $returnurl,
      'CANCELURL'
                                           => $cancelurl,
      'NOSHIPPING'
                                           => '1',
                                           => 'RecurringPayments',
      'L BILLINGTYPE0'
      'L BILLINGAGREEMENTDESCRIPTION0'
                                           => $subscr_name,
      'PAYMENTREQUEST 0 AMT'
                                           => $price,
      'PAYMENTREQUEST_0_CURRENCYCODE'
                                           => $currency,
      'PAYMENTREQUEST 0 ITEMAMT'
                                           => $price,
      'PAYMENTREQUEST_0_PAYMENTACTION'
                                           => 'Sale',
      'L PAYMENTREQUEST_0_NAME0'
                                          => $subscr_name,
      L PAYMENTREQUEST 0 AMT0'
                                          => $price,
      'L PAYMENTREQUEST 0 ITEMCATEGORY0' => 'Digital',
                                          => '1'
      'L PAYMENTREQUEST 0 QTY0'
   );
   $response = pdgs run api call( $req );
   if( ( 'Success' == $response[ 'ACK' ] ) ||
       ( 'SuccessWithWarning' == $response[ 'ACK' ] ) ) {
      $token = $response[ 'TOKEN' ];
      if( get_option( 'pdgs_use_sandbox' ) )
          header( 'Location: https://www.sandbox.paypal.com/incontext?token=' . $token );
          header( 'Location: https://www.paypal.com/incontext?token=' . $token );
      die();
   } else {
      pdgs abort( $response[ 'L ERRORCODE0' ], $response[ 'L SHORTMESSAGE0' ],
          $response[ 'L LONGMESSAGE0' ] );
   }
```

ADD AN AJAX ACTION FOR pdgs setec.

```
ENTER CODE 3.2
```

```
add_action('wp_ajax_pdgs_setec', 'pdgs_setec');
```



Ţ

TEST YOUR CODE

- 1. Navigate to the sample post you created in Lab 1.
- 2. Click the **Pay with PayPal** button. You should see a lightbox displayed on top of the page. The PayPal checkout page should show in the lightbox.



Note: To exit the lightbox, refresh the page.

LAB 4 - HANDLE THE RETURN FROM PAYPAL

ADD A FUNCTION TO HANDLE THE BUYER CANCELLING THE PAYPAL CHECKOUT.

ENTER CODE 4.1

```
function pdgs_cancel() {
    ?><html>
    <body>
    <script type="text/javascript">
    top.jQuery( "#pdgs_error" ).hide();
    top.pdgs_dg.closeFlow();
    </script>
    </body>
    </html>
    <?php
        die();
    }</pre>
```

ADD AN AJAX ACTION TO CALL pdgs cancel.

ENTER CODE 4.2

```
add_action( 'wp_ajax_pdgs_cancel', 'pdgs_cancel');
```

TEST YOUR CODE

- 1. Navigate to the sample post you created in Lab 1.
- 2. Click the Pay with PayPal button.
- 3. Click the **X** in the corner of the PayPal checkout page.



The lightbox should close with no changes to the original page.



ENTER CODE 4.3

```
function pdgs_run_doec_call() {
               = get_option( 'pdgs_price' );
   $price
   $currency = get option( 'pdgs currency' );
   $item_name = get_option( 'pdgs_subscription_name' );
            = $ GET[ 'token' ];
   $payerID = $_GET[ 'PayerID' ];
   $req = array(
                                            => '82.0',
       'VERSION'
       'METHOD'
                                            => 'DoExpressCheckoutPayment',
       'TOKEN'
                                            => $token,
       'PAYERID'
                                            => $payerID,
       'PAYMENTREQUEST 0 PAYMENTACTION'
                                            => 'Sale',
       'PAYMENTREQUEST_0_AMT'
                                            => $price
       'PAYMENTREQUEST_0_CURRENCYCODE'
                                            => $currency,
       'PAYMENTREQUEST_0_ITEMAMT' => $price,
'L_PAYMENTREQUEST_0_NAME0' => $item_name,
'L_PAYMENTREQUEST_0_AMT0' => $price,
       'L PAYMENTREQUEST 0 ITEMCATEGORY0' => 'Digital',
                                          => '1'
       'L PAYMENTREQUEST 0 QTY0'
   $response = pdgs_run_api_call( $req );
   if( ( 'Success' == $response[ 'ACK' ] ) ||
       ( 'SuccessWithWarning' == $response[ 'ACK' ] ) ) {
       return array(
           'transactionid' => $response [ 'PAYMENTINFO 0 TRANSACTIONID' ],
                         => true
           'success'
      );
   } else {
       return array(
                       => $response[ 'L_ERRORCODE0'
          'error'
          'shortmessage' => $response[ 'L SHORTMESSAGE0' ],
          'longmessage' => $response[ 'L LONGMESSAGE0' ],
                        => false
           'success'
       );
   }
}
```

ENTER CODE 4.4

```
function pdgs run createrp call() {
                = get_option( 'pdgs_price');
   $price
              = get_option( 'pdgs_currency' );
   $currency
   $subscr_name = get_option( 'pdgs_subscription_name');
            = $ GET[ 'token' ];
   $frequency = get_option('pdgs_billing_frequency');
              = get_option( 'pdgs_billing_period' );
   $period
   $startdate = pdgs_add_time( $period, $frequency );
   $req = array(
      'VERSION'
                         => '82.0',
      'METHOD'
                         => 'CreateRecurringPaymentsProfile',
      'TOKEN'
                         => $token,
      'PROFILESTARTDATE' => $startdate,
                        => $subscr_name,
                       => $period,
      'BILLINGPERIOD'
      'BILLINGFREQUENCY' => $frequency,
                        => $price,
      'CURRENCYCODE'
                        => $currency
   $response = pdgs_run_api_call( $req );
   if( ( 'Success' == $response[ 'ACK' ] ) ||
      ( 'SuccessWithWarning' == $response[ 'ACK' ] ) ) {
      return array(
          'profileid' => $response[ 'PROFILEID' ],
                    => true
          'success'
      );
   } else {
      return array(
                        => $response[ 'L ERRORCODE0'
          'error'
          'shortmessage' => $response[ 'L SHORTMESSAGE0' ],
         'longmessage' => $response[ 'L_LONGMESSAGE0' ],
          'success'
                       => false
      );
   }
```

ADD A FUNCTION TO RUN A RefundTransaction CALL.

ENTER CODE 4.5

MODIFY pdgs finish TO RUN THE TRANSACTION AND CREATE THE SUBSCRIPTION.

```
function pdgs_finish() {
    global $wpdb;

    $post_id = $_GET['pdgs_post_id'];

    $trx = pdgs_run_doec_call();
    if( '!$trx[ 'success' ] ) {
        pdgs_abort( $trx[ 'error' ], $trx[ 'shortmessage' ], $trx[ 'longmessage' ] );
    }

    $profile = pdgs_run_createrp_call();
    if( '!$profile[ 'success' ] ) {
        pdgs_run_refund_call( $trx[ 'transactionid' ] );
        pdgs_abort( $profile[ 'error' ], $profile[ 'shortmessage' ], $profile[ 'longmessage' ] );
    }

    $profile_id = 'filler';
    $profile_id = $profile[ 'profileid' ];

    $tblname = $wpdb->prefix . 'pdgs_subscribed_users';
...
}
```

MODIFY pdgs_display_final_content TO UPDATE THE CONTENT ON THE PARENT PAGE AND CLOSE THE LIGHTBOX.

ENTER CODE 4.7

```
function pdgs_display_final_content( $content ) {
    $c = addcslashes( pdgs_get_rendered_content( $post_id ), "\r\n'\"" );

?><html>
    <body>
    <script type="text/javascript">
    top.jQuery( "#pdgs_content" ).html( "<?php echo $c; ?>" );
    top.jQuery( "#pdgs_error" ).hide();
    top.jQuery( "#pdgs_form" ).hide();
    top.pdgs_dg.closeFlow();
    </script>
    </body>
    </html>
    <?php
}</pre>
```

TEST YOUR CODE

- 1. Navigate to the sample post you created in Lab 1.
- 2. Click the Pay with PayPal button.
- 3. When the PayPal payment page appears, click Log In.
- 4. Enter the email address and password for your buyer account on the PayPal Sandbox.
- 5. Click Log In.
- 6. Click **Agree and Pay Now**. After a moment, the lightbox should close, and the parent page should change to reflect the full content of the post.



7. Log in to your buyer account on the PayPal Sandbox. In the **My recent activity** box, you should see two transactions – a subscription and a one-time purchase.



LAB 5 - ADD UNSUBSCRIBE FUNCTIONALITY

MODIFY THE pdgs_unsubscribe_user FUNCTION TO MAKE A ManageRecurringPaymentsProfileStatus API CALL TO PAYPAL.

ENTER CODE 5.1

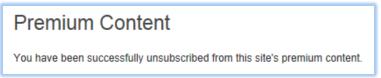
```
function pdgs unsubscribe user( $user id, $profile id ) {
   global $wpdb;
   $req = array(
                  => '82.0',
      'VERSION'
      'METHOD' => 'ManageRecurringPaymentsProfileStatus',
'ACTION' => 'Cancel',
       'PROFILEID' => $profile id
   );
   $response = pdgs_run_api_call( $req );
   if( ( 'Success' != $response[ 'ACK' ] ) &&
       ( 'SuccessWithWarning' != $response[ 'ACK' ] ) ) {
      echo 'Sorry, there was an error trying to cancel your subscription at PayPal. You have
<strong>not</strong> been unsubscribed. You should contact the site administrator for
assistance.<br/>Short />Error code: ' . $resp[ 'L ERRORCODEO' ] . '<br/>br />Short message: ' .
$resp[ 'L_SHORTMESSAGE0' ] . '<br />Long message: ' . $resp[ 'L_LONGMESSAGE0' ];
      return;
   $tblname = $wpdb->prefix . 'pdgs_subscribed_users';
   $$ql = 'DELETE FROM ' . $tblname . ' WHERE user id=' . $user id;
   $wpdb->query( $sql );
   echo 'You have been successfully unsubscribed from this site\'s premium content.';
```

TEST YOUR CODE

- 1. Log in to your WordPress admin.
- 2. Under Users, click Premium Content. You should see an Unsubscribe button.



3. Click the **Unsubscribe** button. You should see a notice informing you that you were successfully unsubscribed.



4. Log in to your buyer account on the PayPal Sandbox. In the **My recent activity** box, you should see a transaction indicating that your subscription has been cancelled.

